

## Information Organization, Usability, Currency & Accessibility (IOUCA)

### Working Group

California Portal Steering Committee

**Date:** March 21, 2006

**Time:** 9:00 – 11:00 a.m.

**Location:** LC II, Room 340

#### Attendees:

<input type="checkbox"/> Neal Albritton (DOR)	<input checked="" type="checkbox"/> Shayn Anderson (EDD)	<input checked="" type="checkbox"/> Steve Branson (DHS)
<input type="checkbox"/> Steve Clemons (CEAP)	<input type="checkbox"/> Mary Fernandez (SPB)	<input type="checkbox"/> Donna Freeman (FTB)
<input type="checkbox"/> Theresa Giles (DHS)	<input checked="" type="checkbox"/> John Jewell (CSL)	<input checked="" type="checkbox"/> Patrick Johnson (DOR)
<input checked="" type="checkbox"/> Anamarie Malone (DTS)	<input checked="" type="checkbox"/> Liz Mechem (Insurance)	<input checked="" type="checkbox"/> Claudina Nevis (SCIO)
<input checked="" type="checkbox"/> Joni Ogata (DMHC)	<input checked="" type="checkbox"/> Kristine Ogilvie (CSL)	<input type="checkbox"/> Rob Quigley (SCIO)
<input checked="" type="checkbox"/> Deborah Schwartz (CRB)	<input checked="" type="checkbox"/> Rick Vagg (DTS)	<input type="checkbox"/> Dan Whetstone (DTS)

#### Review Minutes from Previous Meeting

**Debbie Schwartz**

The minutes for the March 14<sup>th</sup> meeting were approved with no corrections.

#### Recommendation on FTB Template

**Working Group**

No updates on the accessibility or usability reviews. The name of the agenda item will be changed to reflect the review of new templates; the FTB templates are the first to be reviewed, but will not be the only design.

#### Top Level Standards, Guidelines, and Best Practices

**Working Group**

**Accessibility:** The guideline requiring developers to design pages using style sheets is a W3C Level 2 priority; per the working group's previous decision, the Level 2 priority items on use of style sheets would be guidelines not standards<sup>1</sup>. DOR initially included style sheets in the standards, not the guidelines. The group agreed that the state needs to be moving to the use of style sheets in designing websites; they will be required in the future. The group understands that not all departments will be ready to adopt style sheets immediately; however, we need to focus on what is right for the state. If style sheets are required (standard), we would need to let departments know that this is the direction the state is heading and when they are expected to meet the standard. We could name style sheets in the standards, but grandfather in existing pages. The working group will need to discuss the issue further, but agree that this is a critical item.

**Issue (#4):** Guidelines are not always followed. Would it be better to develop standards only, but drive by level of compliance? For example,

Level 1 Standards: Minimal accessibility

Level 2 Standards: Moderate accessibility

Level 3 Standards: High accessibility

Departments could be encouraged to work toward improving their websites by qualifying for higher levels. The state could provide "paths to accessibility" and could provide training for each level.

**Usability:** No update.

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<sup>1</sup> W3C Guideline 3.3: Use style sheets to control layout and position.

W3C Guideline 5.3: Do not use tables for layout unless the table makes sense when linearized. Otherwise, if the table does not make sense, provide an alternative equivalent (which may be a linearized version).

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**NOTE:** When developing standards and guidelines, highlight items that are the direction we want the state to go, but departments are ready to adopt yet.

### **Communication, Training, Adoption, and Enforcement**

**Debbie**

The title of the agenda item will be changed to reflect monitoring rather than enforcement.

The group agreed that we need to determine how to communicate to people throughout the state the standards so they are clear and easy to understand. John passed around a POST document on usability; the document is outdated, but the layout presents a clear and easy to understand table of contents that we may want to use for the standards. The document groups the information into chapters with sections for detailed data. Chapter and section titles are descriptive and clear. Using accessibility as an example, data and layout were identified as two possible chapter headings if the working group decides to use the POST format.

We will need to provide guidance for departments that need to adapt and mature to meet the standards and guidelines.

Where I am now

*What Do I Need To Do?*

Where I Want to Be

The working group brainstormed possible methods to ensure communication (both initial and ongoing), training, and adoption of the standards and guidelines that are being developed. The results are attached.

### **Proof of Concept Using SCIO Templates**

**Debbie**

Anamarie, Claudina, Debbie, Donna, Steve, and Theresa met last week to discuss a process for performing a proof of concept on the standards, guidelines, processes, and templates developed by the IOUCA using the State CIO web pages. We will keep the working group informed of our progress.

### **Open Forum – Recommendations From Team**

**All**

The Portal Redesign Project (PRP) released their Statement of Work for a vendor to develop portal requirements yesterday. The RFI was released about a month ago; 17 vendors have responded. The Statement of Work for the payment engine should be released next week. The PRP team is starting work on the search engine.

The group agreed that the focus of the standards and toolsets should be on universal design and should ensure that the state is ready for the next change. We should not focus on a specific look and feel.

### **Open Issues**

**Debbie Schwartz**

1. How can the state design templates for current technology standards while accommodating departments with a wide range of expertise and software tools?

*The Review Board noted that some content management solutions can resolve this issue, but not all departments have strong content management systems in place. DTS is considering offering support. It was recommended at the IOUCA meeting on March 14<sup>th</sup> that we consider offering a resource gallery of images that can be used by any state department. It would be possible to offer a suite of templates using different color palettes that meet accessibility requirements. Before this can be decided, the issue of single look-*

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*and-feel for all California pages vs. multiple look-and-feel with common branding needs to be resolved at a higher policy level.*

2. How can California enforce the standards after adoption?  
*California will likely approach adoption from an incentive perspective rather than an enforcement perspective. An exception is Section 508 compliance, which is mandated by state and federal law.*
3. Should tools to implement standards (CSS, templates) be developed for current look and feel as well as new look and feels?

**Action Items**

**Kris Ogilvie**

***ACTION:*** *Post amended list of usability recommendations and FTB's implementation status on working group website.*

***Assigned To:*** *Donna Freeman*

***Due:*** *March 28, 2006*

***Update:*** *No update.*

***ACTION:*** *Draft usability standards, guidelines, and best practices.*

***Assigned To:*** *Donna Freeman*

***Due:*** *March 28, 2006 (Update)*

***Update:*** *No update.*

***ACTION:*** *Send an email to Neal emphasizing the importance of DOR's involvement in the proof of concept.*

***Assigned To:*** *John Jewell*

***Due:*** *March 28, 2006*

***Update:*** *John will speak with Richard Devylder at DOR to determine the appropriate channel to route the message.*

***ACTION:*** *Identify formats currently being used on California web pages.*

***Assigned To:*** *Steve Clemons*

***Due:*** *March 28, 2006 (Update)*

***Update:*** *No update.*

***ACTION:*** *Frame the issue of application accessibility and usability.*

***Assigned To:*** *Steve Clemons*

***Due:*** *March 28, 2006 (Update)*

***Update:*** *No update.*

***ACTION:*** *Conduct high level research and frame the issue of accessibility and usability in regards to online forms.*

***Assigned To:*** *Steve Clemons*

***Due:*** *March 28, 2006 (Update)*

***Update:*** *No update.*

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**ACTION:** *Provide a copy of the notes from the conference call with Center for Digital Government (CDG).*

**Assigned To:** *Debbie Schwartz*

**Due:** *March 28, 2006*

**Update:** *Waiting for permission to distribute from CDG. Debbie sent a follow up.*

**ACTION:** *Complete the preliminary accessibility review of the FTB templates.*

**Assigned To:** *Neal Albritton*

**Due:** *March 28, 2006 (Update)*

**Update:** *In progress. Neal will email a report on his analysis to the IOUCA when complete.*

**ACTION:** *Complete the accessibility standards and guidelines workbook.*

**Assigned To:** *Neal Albritton*

**Due:** *March 28, 2006*

**ACTION:** *Post the workbook on the IOUCA working group website.*

**Assigned To:** *Neal Albritton/Donna Freeman*

**Due:** *March 28, 2006 (Update)*

**ACTION:** *Using the list of formats currently being used on California web pages, note which formats are completely accessible, and identify conversion options for formats that are not completely accessible.*

**Assigned To:** *Steve Clemons and Neal Albritton*

**Due:** *March 28, 2006 (Update)*

**Update:** *Delayed update one week; dependent on completion of list of formats to begin.*

**ACTION:** *Complete the detailed accessibility review of the FTB templates.*

**Assigned To:** *Neal Albritton*

**Due:** *April 4, 2006*

**Update:** *Plan to begin next week after preliminary analysis is complete. It will take two weeks to complete.*

**ACTION:** *Develop a beginner's version of the workbook.*

**Assigned To:** *Neal Albritton*

**Due:** *April 4, 2006 (Update)*

**ACTION:** *Discuss a process for disseminating information to a wide audience quickly.*

**Assigned To:** *John Jewell and Dan Whetstone*

**Due:** *April 18, 2006 (Update)*

**ACTION:** *Follow up on the feasibility of using GTC, Executive Institute, and CIO Academy as vehicles for ongoing training.*

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*Assigned To: Claudina Nevis and Liz Meecham*

*Due: April 25, 2006 (Update)*

*Update: Update in one month.*

**Next Steps**

**Kris Ogilvie, Debbie Schwartz**

Next IOUCA Meeting: March 21, 2006

Library & Courts II, 900 N Street, Room 340

9:00 – 11:00 a.m.

**New Agenda Item:** Debbie will add an agenda item to discuss style sheets and to determine if they should be standards or guidelines. Steve and Patrick will present a demonstration on the benefits and uses of style sheets, including the business drivers and risks of not using style sheets. Debbie will provide a laptop and projector for the demonstration.

## **Information Organization, Usability, Currency & Accessibility (IOUCA)**

### **Communication, Training, and Adoption – Brainstorming Results**

#### **Communication**

1. Referral to model agencies
  - View
  - Contact information
2. Web content managers forum
  - Website
  - Monthly conference call (topic specific)
  - eMail List
3. Timeline (note, copied in adoption)
  - Phases
  - Iterations
  - Steps on how to get there
4. usability.ca.gov
  - Checklists
  - Models
  - Standards
  - Guidebook
5. Initial communication of standards, etc.
  - eMail list of webmasters
  - Send to CIO's
  - Forum for webmasters in public sector (may already exist)
6. Publicity release?
  - Government technology publications?

#### **Training**

1. Accessibility Training for webmasters
  - Provided by Department of Rehabilitation (DOR)
    - Eight classes total
    - 25 people per class
    - Will be held August – September 2006
2. Website
  - Just-in-time accessibility training (DOR will provide)
  - Training tailored for specific template releases
  - Online training, computer-based training, tutorials
3. Usability Training
  - General usability
  - User testing
  - Standards and best practices
  - How to implement usability
  - Usability models repository

## **Information Organization, Usability, Currency & Accessibility (IOUCA)**

### **Communication, Training, and Adoption – Brainstorming Results**

#### **Adoption**

1. Timeline (note, copied in communication)
  - Phases
  - Iterations
  - Steps on how to get there
2. Repository
  - Cascading Style Sheets
  - Code
  - Scripts
  - Graphics
  - Usability Models
3. User Testing
4. Design
  - Place to introduce new designs
  - What developers need to know to implement new and existing designs
  - Collection of style sheets for use